



## Team Meeting Checklist

Ongoing discussions between Case Manager and individual/guardian should occur throughout the plan year. These discussions should be documented in the case manager's monthly case notes.

### Prior to any team meeting, the case manager must assist the individual and guardian to:

- ☐ Identify desired outcomes, dreams, employment, and service utilization over the plan year.
- ☐ Identify non-waiver services, self-directed services, traditional services, and potential providers to meet desired outcomes.
- ☐ Identify the amount of time they would like to spend in each service.
- ☐ Coordinate new provider visits if needed.
- ☐ Identify who should be at the meeting and the date of team meeting.
- ☐ Identify what sections of the plan of care the individual/guardian would like to present at the meeting.
- ☐ Complete/update the following sections of the plan: Individual Preferences, Demographics, Medical information, Equipment, Circle of Supports, and review the Rights, Responsibilities, and Restrictions using the "Restrictions to Rights Planning Document."

### Case Manager will:

- ☐ Send out written (30 days) notice prior to the Annual IPC Planning meeting and the 4-6 Month Review, to all identified team members and local Participant Support Specialist.
- ☐ Review assessments and provides a summary consisting of the recommendations, notable comments, strengths, weaknesses, learning style, possible reinforcement tools, motivators, behavioral concerns.
- ☐ Write a summary of the monthly case notes to identify trends regarding incident reports, seizure logs, medical needs, health and safety, MAR's and PRN medication usage, and targeted behavior frequency.
- ☐ Receive functional analysis from provider on identified behaviors needing to be addressed in a Positive Behavior Support plan.
- ☐ Obtain from each service provider a written summary of how the current services are going and if applicable a summary of the current objective. The objective summary should include progress toward mastery, areas of concern or lack of progress and suggestions for development.

### Annual Plan of Care Meeting Checklist

- ☐ Give the individual and guardian opportunity to address the team on the dreams, desires, and what they would like their future to be like. Provide support and opportunity for the individual to address how they would like the following areas to be reviewed.
- ☐ Complete (or if done, review) Individual Preferences section and obtain input.
- ☐ Review of current objective progress by individual or provider.
- ☐ Review assessments and resulting recommendations.
- ☐ Review summary of incident reports, seizure logs.
- ☐ Identify and address any health and safety issues.
- ☐ Discuss frequency and trends of targeted behaviors.
- ☐ Review and update Functional Analysis and develop Positive Behavior Support Plan.

- ☐ Discuss 'Rights, Needs, Restrictions' section, and how the team will support the individual's rights.
- ☐ Identify how each provider will align their services with the individual's preferences
- ☐ The individual/ guardian address the needs and preferences of the individual that need to be in the schedule.
- ☐ Objectives are develop based upon individual's desire, assessments, task analysis, and baseline.
- ☐ Identify timelines for identified benchmarks towards reaching final objective.
- ☐ Discuss level of support and units for each service
- ☐ Create Service Authorization form
- ☐ Signatures
- ☐ Submit plan of care to Division 30 Calendar days before IPC intended start. **If there is an ECC request, it must be submitted 40 days before intended IPC start date.**

#### 4-6 Month IPC Review Meeting Checklist

The purpose is to review and assess as a team whether or not the plan is working as written and if not, what can the team do to make it work?

- ☐ Give the individual and guardian opportunity to address the team on the dreams, desires, and what they would like their future to be like. Provide support and opportunity for the individual to address how they would like the following areas to be reviewed.
- ☐ Update the entire IPC to reflect any and all changes
- ☐ Review schedules to verify they accurately reflect the activities, timeframes, preferences, and needs of the individual.
- ☐ Have a meaningful discussion regarding summaries of incident reports, seizure logs, and current services.
- ☐ Share celebrations towards progress on Individual's objectives
- ☐ Review and/or revise Positive Behavior Support plan based upon identified trends in behaviors
- ☐ Review Rights, Responsibilities, and Restriction and any modification/restrictions/restorations needed
- ☐ Review health and safety risks and plans to address them in "Risks, Needs, Restriction" section
- ☐ Determine what assessments will need to be completed prior to the next annual meeting
- ☐ Review service utilization and any modifications
- ☐ Signatures.